Data Exchange

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Data Exchanges Through VIIS

The data exchange feature of VIIS gives you the capability to automatically exchange immunization batch files. Only VIIS users with roles of "Data Exchange," "HMO User," or "Administrator" will be able to perform data exchanges. HMO users will need to follow the steps in the "HMO Data Exchanges" section of this chapter.

Provider Organization Data Exchanges

Prior to performing a data exchange, your provider organization will need to contact the VIIS project manager and arrange for your organization to be set up to perform data exchanges. You will need to provide the following information regarding the exchange:

- File format: Indicate Health Level 7 (HL7) or Flat File.
- Direction of data: Indicate whether the data will be bidirectional, provider organization to VIIS, or VIIS to provider organization.
- Type of transmission: Indicate whether the exchange will be a test or an actual production transfer.

To perform a data exchange, follow these steps:

1. Click on Exchange Data under Data Exchange on the menu panel. Depending upon the type of file format and direction of data you will be using, one or more of the following fields will display:

- Job Name: Fill in a name for the data exchange, if desired. If left blank, VIIS will use the current date for a job name.
- Client File Name: This field is required if you have chosen "bidirectional" or "provider organization to VIIS" as a data direction, and your file format is Flat File. Press Browse; to select the appropriate Client File Name.
- Immunization File Name: This field is required if you have chosen "bidirectional" or "provider organization to VIIS" as a data direction, and your file format is Flat File. Press Browse to select the appropriate Immunization File Name.
- Comment File Name: This optional field will appear if you exchange data via Flat File format and have chosen "bidirectional" or "provider organization to VIIS" as a data direction.
- HL7 File Name: This field is required for users who are exchanging data using the HL7 file format. Press Browse to select the HL7 file you wish to upload.

2. Press the Upload or Request Download button on your screen, whichever is displayed.

3. The Exchange Data Result screen will display. This screen will list the files that were uploaded using "bidirectional" or "provider organization to VIIS" data directions and will confirm or provide the job name to the user.

4. Press Check Status.

5. The Exchange Data Status screen will display. This screen will contain the job name, user name, exchange data date, process start and end date , and status of the current job.

6. Press REFRESH periodically to check the status of the job.

7. When a job is completed, the job name will appear underlined and in
blue. Under the status column, one of three messages may appear.
   - Complete: This message indicates the job has completed processing.
   - Error: This message indicates the job could not be processed because of formatting errors.
   - Exception: This message indicates that the job could not be processed because of an internal system error.
8. Click on the underlined job name.

9. If the job completed successfully, the Job Detail screen will display.

This screen contains three sections:

- Download Files for: <Job Name>: This section contains all output files available for you to download, including the Response Files and any "VIIS to provider organization" download files. Click on the blue, underlined download name to download the file.

- Download Log for: <Job Name>: This section contains information regarding activity of the download file(s), including file name, user name, and date and time of the download(s).

- Summary Information for: <Job Name>: This section contains all information pertinent to the exchanged data file received and processed.

10. If the job did not complete successfully, the Job Error screen will display. This screen will contain an explanation of why the exchange

data could not be processed, contains the original uploaded file(s), and lists information regarding the activity of the downloaded file(s).

HMO Data Exchanges

Prior to performing an HMO data exchange, your HMO will need to contact the VIIS project manager and arrange for your organization to beset up to perform data exchanges. You will need to provide the following information regarding the exchange:

- *File format:* Indicate HL7 or Flat File.
- *Type of transmission:* Indicate whether the exchange will be a test or an actual production transfer.

To perform an HMO Data Exchange, follow these steps:

1. Click on Submit HMO Data or Submit HMO Query under the Data Exchange menu option. Depending upon the selection made and the type of file format you are set up to use, one or more of the following fields will display:
    - Job Name: Fill in a name for the data exchange, if desired. If left blank, VIIS will use the current date for a job name.
    - Client File Name: This field is required if your file format is Flat File. Press Browse to select the appropriate Client File Name.
    - Immunization File Name: This optional field will appear if you ex change data via Flat File format. Press Browse to select the appropriate Immunization File. The Immunization File must contain at least one immunization.
    - Comment File Name: This optional field will appear if you exchange data via Flat File format.
    - HL7 File Name: This field is required for users who are exchanging data using the HL7 file format. Press Browse to select the HL7 file you wish to upload.
    - Query File Name: This field is required for users who are running an HMO query. Press Browse to select the appropriate query file. For the format of the HMO query, please see the HMO Query Specification.
2. Press Upload.
3. The Exchange Data Result screen will display. This screen will list the files that were uploaded and will confirm or provide the job name to the user.
4. Press the Check Status button.
5. The Exchange Data Status screen will display. This screen will contain the job name, user name, exchange data date, process start and end date, and status of the current job.

6. Press Refresh | periodically to check the status of the job.
7. When a job is completed, the job name will appear underlined and in blue. Under the status column, one of three messages may appear:
    - Complete: This message indicates the job has completed processing.
    - Error: This message indicates the job could not be processed because of formatting errors.
    - Exception: This message indicates that the job could not be processed because of an internal system error.
8. Click on the underlined job name.
9. If the job completed successfully, the Job Detail screen will display. For jobs created from the Submit HMO Data menu option, these sections will display:
    - Download Files for: <Job Name>: This section contains all output files available for you to download, including the Response Files and any "VIIS to provider organization" download files. Click on the blue, underlined download name to download the file.
    - Download Log for: <Job Name>: This section contains information regarding activity of the download file(s), including file name, user name, and date and time of the download(s).
    - Summary Information for: <Job Name>: This section contains all information pertinent to the exchanged data file received and processed.

For jobs created using the Submit HMO Query menu option, the following sections will display

- Download Files for: <Job Name>: Contains the Demographic File, Immunization File, and Exception File, all available for download by clicking on the underlined file name.
- Download Log for: <Job Name>: Contains information regarding activity of the download files.

10. If the job did not complete successfully, the Job Error screen will display. This screen contains an explanation of why the exchange data could not be processed contains the original uploaded file(s), and lists information regarding the activity of the downloaded file(s).

Organizational Extracts

The organizational extract feature allows data exchange users to generate a report showing clients selected by organization, county, vaccine group, client status, and date ranges.

To generate an organizational extract, follow these steps:

1. Click on Organizational Extract under Data Exchange on the menu panel.
2. Select Organization ID(s): *This section will only display for providers with child organizations entered in VIIS.*

   - All Clients for Parent and All Child Organizations: Click this option to request that VIIS return all clients in parent and child organizations.
   - All Clients for Parent Organization: Click this option to request that VIIS return clients associated only with the parent organization.
   - All Clients for These Child Organizations: Click this option to re quest that VIIS return all clients in selected child organizations. If you choose this option, select the desired child organization(s) by double clicking the organization name or by highlighting the name and pressing ADD.
3. Select County(s): Indicate whether you wish to return clients from all counties or only those clients with residence within the counties selected. If you choose to return only clients from selected counties, choose the desired counties by double clicking the organization name or by highlighting the name and pressing Add j.
4. Select the Vaccine Group(s): Indicate whether you wish to return all clients regardless of vaccine history, or return only those clients that have had an immunization from one of the selected vaccine groups. If you choose to return only clients with immunizations from selected vaccine groups, choose the desired vaccine group(s) by double clicking the group name or by highlighting the name and pressing ADD.

5. Select Date Criteria:

   - No Date Criteria: Click this option to indicate that you want VIIS to return clients regardless of the date the client or immunizations were last updated.
   - Vaccine Administration Date Range: Click this option to indicate that you want VIIS to return only clients that have had an immunization within the date range entered. Once the option is selected, two text boxes with calendar controls will appear to the right of the line. Enter dates in the MMDDYYYY format in both the From and To text boxes.

- Birth Date Range: Click this option to indicate that you want VIIS to return only clients with a date of birth within the date range entered. Once this option is selected, two text boxes with calendar controls will appear to the right of the line. Enter dates in the MMDDYYYY format in both the From and To text boxes.

Client Update Date Range: Click this option to indicate that you want VIIS to return only clients that have been updated within the date range entered. Once the option is selected, two text boxes with calendar controls will appear to the right of the line. Enter dates in MMDDYYYY format in both the From and To text boxes.

6. Select Client Status:
   - All — Indicate that you want all active, inactive, and permanently inactive/deceased clients to be returned by clicking this option.
   - Active — Indicate that you want VIIS to return only active clients by clicking this option.
   - Inactive — Indicate that you want VIIS to return clients with an inactive association by clicking this option.
   - Permanently Inactive/Deceased — Indicate that you want VIIS to return only clients with a permanently inactive/deceased association by clicking this option.
7. Select Extract Format:
   - Job Name — Enter a name for the extract job, or leave this field blank and VIIS will assign an extract name using the current date.
   - VIIS Flat File Format — Click on this option to select flat file format. VIIS defaults to this format if no other option is selected.
   - HL7 2.3.1 Transaction Format — Click on this option to select this HL7 format.
   - HL7 2.4 Transaction Format — Click on this option to select this HL7 format.
8. Press Generate).
9. The Exchange Data Status screen will display. Press Refresh periodically to check status. When the organizational extract is complete, the job name will be underlined and in blue.
10. Click on the extract job name.
11. Click on the Client File, Immunization File, or Comment File link at the Job Detail screen**.**

12. Press Back on your browser to return to the Job Detail screen.